

Amendment to the Specification

Please amend the numbered paragraphs and the table of the originally filed specification as indicated in the corresponding numbered paragraphs below.

Note that the paragraph numbering used below corresponds to the application as filed, **not** the application as published (2005/0192822). In the published application, paragraph [0015] and on refer to the text originally filed as paragraphs [0016] and on.

In amended Table 1, only the row 7th from the end of the table is amended.

[0061] Region 405 includes a group of buttons for selecting alternate presentations for region 406, a group of buttons for beginning data entry, and a control for selecting which aggregation of items will be presented in region 406. By activating Calendar button 440, a request is made for a combination calendar and task list presentation of Items and related information (as shown) in region 406. By activating Tasks button 442, a request is made for a larger and more detailed task list presentation of Items and related information in region 406. By activating ~~Contracts~~ Contacts button 444, a request is made for a presentation of Persons and related information in region 406. Each alternate presentation includes forms for data entry and controls for requesting other pages of the site. Buttons in region 405 may be omitted from alternate presentations for region 406. For example, a Contacts presentation omits buttons 450-456.

[0066] Text-menu box 467 presents alternative Aggregations for user selection. In the example Calendar presentation, on activating an Aggregation different from the current Aggregation, a request is made for appointment Items, task Items and related information for presentation in region 406 provided that these data are part of the specified Aggregation. If text is entered in box ~~267~~ 467, a request is made for defining a new Aggregation.

[0073] Calendar grid 461 may appear as a grid or column depending on the span of time to be presented. As shown, presentation 461 includes a column of rows, each row having indicia of a calendar date. The calendar date may act as a button that, when activated, requests a form for user entry of a new or revised appointment Item automatically configured for the date activated. Each row may further include one or more descriptions of appointment Items, and several buttons for each description. For example, row ~~[[464]]~~ 462 includes a title 464 of an

appointment Item that includes a hypertext link, a list of persons 465 identified to the appointment that includes a hypertext link for each person, a T button 466, an E button 467, and an N button 468. By following title link 464, a request is made for a form for revising or learning more about the appointment Item. By following a person link 465, a request is made for a form for revising or learning more about the person (e.g., a phone number). By activating T button 466, a request is made to begin capturing time for this user against the FeeAccount related to the appointment Item. By activating E button 467, a request is made to capture an expense for this user against the ExpenseAccount related to this appointment Item. To capture an expense, a form is typically provided for user entry of the description of the expense and specification of related information. By activating N button 468, a request is made for a form for user input of a Note to be related to this appointment Item.

Table 1

Ref.	Database Table Name	#	Field Name	Comment
502	Affiliation	1	AffiliationId	A registered Person 506 has one or more Affiliations 502 (548). An affiliation is a collection of information that the Person will see and edit in a Session 902. For convenience of affiliation management, any parts of one Affiliation may be parts of any number of other Affiliations. In this way several whole Affiliations (possibly administered by others) may be a convenient part of one of several Affiliations used by a Person in a Session.
502	Affiliation	2	Name	
504	Group	1	GroupId	A Group typically has many Persons 506 (546). A Group may be a member 544 of another Group. For example, a work group may have designers, assemblers, and managers.
504	Group	2	Name	
506	Person	1	PersonId	
506	Person	2	Name	First name, middle name(s), last name (s), titles, salutations, and suffixes may be implemented in separate fields.

Ref.	Database Table Name	#	Field Name	Comment
506	Person	3	PersonType	For example: Minor/Adult, or Male/Female.
506	Person	4	Username	Used to begin a Session 902.
506	Person	5	Password	Used to begin a Session 902.
506	Person	6	EmailAddress	
506	Person	7	BillingRate	The default rate to charge for this Person's time, for example, in dollars per hour.
506	Person	8	AffiliationId	Identifies the Affiliation to be used for an initial context 418 for a Session 902 started by this Person.
506	Person	9	AggregationId	Identifies an initial Aggregation 467 to be used for a Session 902 started by this Person.
508	Aggregation	1	AggregationId	An Aggregation provides a configuration for conveniently using a selected subset (552) of an affiliation 502. The configuration may define the scope of presentations (e.g., how many day rows 462 in a "week view" 452). An Aggregation may implement usage rights and restrictions.
508	Aggregation	2	Name	
510	DateRange	1	DateRangeId	A DateRange provides a named span of time, which may be absolute (e.g., Mardi Gras 1995) or relative (e.g., a 9 month gestation period)
510	DateRange	2	Name	
510	DateRange	3	FromDateTime	
510	DateRange	4	ToDateTime	
510	DateRange	5	Duration	For example, 3 days and 12 hours.
512	Location	1	LocationId	A Location describes a physical place such as the place for an appointment, or the site of a building construction task.
512	Location	2	Name	
514	Resource	1	ResourceId	A Resource may describe a physical

Ref.	Database Table Name	#	Field Name	Comment
				object related to an Item, for example, a portable piece of equipment, or a delivery of materials. A Resource may alternatively describe a capability for performing a process, for example, video conference management needed for a virtual meeting Item.
514	Resource	5	Name	
514	Resource	6	Description	
516	Category	1	CategoryId	A Category typically has many Items 518 (568). Category is somewhat analogous to Group 504, except that a hierarchical group of Items is called a Project 520.
516	Category	2	Name	
517	Flag	1	FlagId	
517	Flag	2	Unread	Asserted on creation or modification of the flagged thing.
517	Flag	3	RSVP	Not required, pending, accepted, denied.
517	Flag	4	Priority	High, medium, low.
517	Flag	5	Highlight	The highlight value may correspond to any one of a set of flag symbols that a user may use in any manner, for example, to make items stand out in a list.
517	Flag	6	Selected	User designated as asserted or not asserted for convenient <i>en masse</i> operations such as move 1375, copy 1376, or delete (not shown) all so flagged items.
517	Flag	7	Recurring	Designates the flagged appointment or task as an instance of a set of appointments or tasks, for example, a periodically recurring board meeting.
518	Item	1	ItemId	An Item is the fundamental object being managed by affiliation manager 136. Each Item may model an act of collaboration of an affiliation (e.g., an appointment or a task).
518	Item	2	Name	

Ref.	Database Table Name	#	Field Name	Comment
518	Item	3	ItemType	For example: appointment or task.
518	Item	4	Description	
518	Item	5	ItemStatus	For example: To do, Doing, On hold, Cancelled, or Done.
518	Item	6	ItemDueDateTime	A target for the completion of all subordinate ItemDates (if any) that are part of this Item.
518	Item	7	ItemCompletion	A stated percent complete entered by an authorized user.
519	Alarm	1	AlarmId	
519	Alarm	2	ItemId	An ItemId or any analogous Id of a thing associated with the alarm (e.g., a LocationId, ResourceId, ProjectId, FeeAccountId, ExpenseAccountId, DisbursementId, FolderId, DocumentId, NoteId, OrganizationId, PersonId, AffiliationId, AggregationId, or EmailId).
519	Alarm	3	PersonId	The person being notified by the alarm.
519	Alarm	4	DateTime	
519	Alarm	5	DateTimeType	Absolute, relative to task start, relative to task due, relative to appointment start.
519	Alarm	6	Status	Dormant, active, acknowledged.
519	Alarm	7	SessionId	The alarm may spawn a new session so that the user has complete control of context in which to dispose of the alarm, terminate the new session, and return to the previously existing session.
519	Alarm	8	Description	A comment that may be written by the user or the system when the alarm is defined; and then presented to the user when the alarm becomes active to explain the purpose of this type of alarm (e.g., generic description) or the purpose of this particular instance of the alarm (e.g., customized description).
520	Project	1	ProjectId	A Project typically has many Items. The Items may be expressed with dependency

Ref.	Database Table Name	#	Field Name	Comment
				(570) on other Items.
520	Project	2	Name	
520	Project	3	Description	
522	FeeAccount	1	FeeAccountId	A FeeAccount collects time logged (714) by a Person when participating in or performing an Item.
522	FeeAccount	2	Name	
524	ExpenseAccount	1	ExpenseAccountId	An ExpenseAccount collects Disbursements logged (718) by a Person when participating in or performing an Item.
524	ExpenseAccount	3	Name	
526	Disbursement	1	DisbursementId	A Disbursement describes is a recurring cost or a cost that has a unit value. For example, received FAX documents may be billed at a cost per page received. The cost per page is an attribute of a Disbursement; and, the total number of pages for a particular FAXed document is captured (718) with an ItemDate.
526	Disbursement	2	Name	
526	Disbursement	3	UnitCost	
528	Extract	1	ExtractId	An Extract typically has many Charges (802).
528	Extract	2	DateTime	Date and time that this Extract was created. Typically all information of an Extract is reported by download from affiliation manager 136 to accounting system 157.
529	Folder	1	FolderId	Folders may be automatically defined by system 100 or user defined. System 100 may define folders to coordinate, for example, document transfer (e.g., email, items, and other data) among multiple servers 102 on network 106.
529	Folder	2	Name	
530	ChatSession	1	ChatSessionId	A ChatSession enables two or more

Ref.	Database Table Name	#	Field Name	Comment
				Persons in currently active Sessions to exchange extemporaneous messages in a dialog.
530	ChatSession	2	Name	
530	ChatSession	3	StartDateTime	A chat session is active when the start date is in the past and the end date is null or in the future.
530	ChatSession	4	EndDateTime	
532	Subject	1	SubjectId	Used to link any Email, ChatMessage, or Note to a Person, Location, Resource, Item, Project, Document, other ChatMessage, or other Email.
532	Subject	2	Name	
532	Subject	3	Description	Suitably includes words and phrases to assure correlation between email text and a proper SubjectId.
532	Subject	4	SubjectStatus	For example: Open or Closed. By closing a subject, associating to that subject subsequently received email and chat messages may be precluded.
542	Affiliation-Group	1	AffiliationId	
542	Affiliation-Group	2	GroupId	A user may create any number of Groups in any of several Affiliations, limited by access privileges (550) and Aggregations currently in force.
542	Affiliation-Group	3	WgRelationship	Nexus: a social organization identified in field 2 may correspond to the nexus of this Affiliation (e.g., a company, a team, a church, a club). Part: a Group may be a part of the Affiliation without being its nexus.
544	Group-Group	1	GroupId	Ordinate.
544	Group-Group	2	GroupId	Subordinate. The subordinate Group is an affiliate of the ordinate Group.
546	Group-Person	1	GroupId	
546	Group-Person	2	PersonId	Used as a "contact list" for this Group.
548	Affiliation-Person	1	AffiliationId	

Ref.	Database Table Name	#	Field Name	Comment
548	Affiliation-Person	2	PersonId	
548	Affiliation-Person	3	WpRelationship	Administrator: the Person in field 2 generally has access to edit/add/delete all records of the Affiliation. A Person who created or edited the Affiliation and a system administrator may each be defined as Administrator for an affiliation. Contact: used as a "contact list" for this Affiliation.
550	Affiliation-Person-Aggregation	1	AffiliationId	
550	Affiliation-Person-Aggregation	2	PersonId	
550	Affiliation-Person-Aggregation	3	AggregationId	Identifies the AccessAggregation. The Person of field 2 has access only to those records that are included in this Aggregation.
550	Affiliation-Person-Aggregation	4	UsageRight	For example: permission to Create various kinds of objects (Affiliations, Persons, etc.), permission to Delete various kinds of objects and relationships, Edit, Link to, or View.
552	Affiliation-Aggregation	1	AffiliationId	
552	Affiliation-Aggregation	2	AggregationId	Identifies a SubjectAggregation.
554	Affiliation-DateRange	1	AffiliationId	
554	Affiliation-DateRange	2	DateRangeId	
556	Affiliation-Location	1	AffiliationId	
556	Affiliation-Location	2	LocationId	
558	Location-Person	1	LocationId	
558	Location-Person	4	PersonId	Identifies a Person serving as a contact at this location (e.g., receptionist, host,

Ref.	Database Table Name	#	Field Name	Comment
				switchboard operator, or guard).
560	Affiliation-Resource	1	AffiliationId	
560	Affiliation-Resource	2	ResourceId	
562	Resource-Location	1	ResourceId	
562	Resource-Location	2	LocationId	
564	Resource-Person	1	ResourceId	
564	Resource-Person	2	PersonId	Identifies a Person serving as a contact for this Resource (e.g., usage coordinator, repairman).
566	Affiliation-Category	1	AffiliationId	
566	Affiliation-Category	2	CategoryId	
567	Flag-Item-Person	1	FlagId	
567	Flag-Item-Person	2	ItemId	
567	Flag-Item-Person	3	PersonId	
567	Flag-Item-Person	4	Comment	May be displayed when a pointing device cursor is located over an icon of the particular flag to explain or suggest usage of the flag.
568	Category-Item	1	CategoryId	
568	Category-Item	2	ItemId	
569	Affiliation-Item	1	AffiliationId	
569	Affiliation-Item	2	ItemId	
570	Item-Item	1	ItemId	Ordinate.
570	Item-Item	2	ItemId	Subordinate.
570	Item-Item	3	ItemRelationship	For example: Starts after (AND), Starts after (OR), or Ends with.
571	Alarm-Item-Person	1	AlarmId	
571	Alarm-Item-Person	2	ItemId	
571	Alarm-Item-Person	3	PersonId	

Ref.	Database Table Name	#	Field Name	Comment
572	Affiliation-Project	1	AffiliationId	
572	Affiliation-Project	2	ProjectId	
574	Project-Item	1	ProjectId	
574	Project-Item	2	ItemId	
576	Project-Person	1	ProjectId	
576	Project-Person	2	PersonId	Identifies a Person serving as a contact for this Project (e.g., a cost, logistics, and schedule coordinator). Other Persons performing tasks of a Project are related (712) to Items.
578	Affiliation-FeeAccount	1	AffiliationId	
578	Affiliation-FeeAccount	2	FeeAccountId	
580	FeeAccount-Person	1	FeeAccountId	
580	FeeAccount-Person	2	PersonId	Identifies a Person serving as a contact for this FeeAccount (e.g., to whom to send a bill).
582	Affiliation-ExpenseAccount	1	AffiliationId	
582	Affiliation-ExpenseAccount	2	ExpenseAccountId	
584	ExpenseAccount-Person	1	ExpenseAccountId	
584	ExpenseAccount-Person	2	PersonId	Identifies a Person serving as a contact for this FeeAccount (e.g., to whom to send a bill).
586	Affiliation-Disbursement	1	AffiliationId	
586	Affiliation-Disbursement	2	DisbursementId	
588	Affiliation-Extract	1	AffiliationId	
588	Affiliation-Extract	2	ExtractId	
590	Extract-Person	1	ExtractId	

Ref.	Database Table Name	#	Field Name	Comment
590	Extract-Person	3	PersonId	Identifies a Person serving as a contact for this Extract (e.g., who ordered the Extract).
591	Affiliation-Folder	1	AffiliationId	
591	Affiliation-Folder	2	FolderId	
592	Affiliation-ChatSession	1	AffiliationId	
592	Affiliation-ChatSession	2	ChatSessionId	
593	Person-Folder	1	PersonId	
593	Person-Folder	2	FolderId	
594	Affiliation-Subject	1	AffiliationId	
594	Affiliation-Subject	2	SubjectId	
595	Folder-Folder	1	FolderId	Ordinate.
595	Folder-Folder	2	FolderId	Subordinate.
596	Person-Person	1	PersonId	Ordinate.
596	Person-Person	2	PersonId	Subordinate.
596	Person-Person	3	PpRelationship	For example: supervisor of ordinate, secretary of ordinate, job share partner, spouse of ordinate, child of ordinate, client of ordinate, vendor of ordinate, prospect of ordinate, or other.
602	Phone	1	PhoneId	
602	Phone	2	PhoneNumber	
604	Address	1	AddressId	
604	Address	2	Name	For example, the name of a campus, an estate, an office park, or a building.
604	Address	3	Room	
604	Address	4	Floor	
604	Address	5	StreetAddress	
604	Address	6	City	
604	Address	7	State	
604	Address	8	ZipCode	

Ref.	Database Table Name	#	Field Name	Comment
604	Address	9	Country	
606	TimeZone	1	TimeZoneId	
606	TimeZone	2	Name	
606	TimeZone	3	ZuluOffset	
606	TimeZone	4	SummerOffset	
608	Person-Phone	1	PersonId	
608	Person-Phone	2	PhoneId	
608	Phone	3	Description	For example: Work, Home, Mobile.
610	Person-Location	1	PersonId	
610	Person-Location	2	LocationId	
610	Person-Location	3	Description	For example: Residence, School, or Day Job.
612	Location-Phone	1	LocationId	
612	Location-Phone	2	PhoneId	
614	Location-Address	1	LocationId	
614	Location-Address	2	AddressId	
616	Location-TimeZone	1	LocationId	
616	Location-TimeZone	2	TimeZoneId	
618	Organization	1	OrganizationId	
618	Organization	2	Name	A company name.
620	Person-Organization	1	PersonId	
620	Person-Organization	2	OrganizationId	
620	Person-Organization	3	Title	Person's official title in the organization (e.g., President).
622	Organization-Organization	1	OrganizationId	Ordinate.
622	Organization-Organization	2	OrganizationId	Subordinate.

Ref.	Database Table Name	#	Field Name	Comment
702	ItemDate	1	ItemDateId	An ItemDate models an act of collaboration by one or more affiliates during one uninterrupted period of time. An Item 304 may have (716) several ItemDates (342, 344, 346).
702	ItemDate	2	StartDateTime	
702	ItemDate	3	EndDateTime	
702	ItemDate	4	Repetitions	Identifies the position of this ItemDate in a series of occurrences, for example, 2nd (344) of a total of 3 (304).
702	ItemDate	5	RepeatInterval	For example, the number of days (7) from ItemDate 342 start (the 7th) to ItemDate 344 start (the 14th).
702	ItemDate	6	RepeatStartDate	For example, period 306 start (the 4th).
702	ItemDate	7	RepeatEndDate	For example, period 306 end (the 30th)
702	ItemDate	8	Duration	A relative duration for completing the ItemDate. Facilitates scheduling Project Items in cascade.
704	Document	1	DocumentId	
704	Document	2	DocumentPath	The document itself may be any type of data in any storage format. For example, text, graphics, spreadsheet, database, audio, video, streaming audio/video, program, object, script, module, library; or a structure (e.g., hypertext, XML) comprising any of the above (e.g., for use as a web page, applet, or email).
712	Item-Person	1	ItemId	
712	Item-Person	2	PersonId	
712	Item-Person	3	IpRelationship	For example: Controller (a Person responsible for the cost, logistics, or schedule of the item); Actor (a Person solely or jointly responsible for performing or participating in an Item; or Invitee (a GroupId for those permitted to edit the Item, e.g., to join themselves to the Item. All Actors may also be Controllers to facilitate editing the Item.

Ref.	Database Table Name	#	Field Name	Comment
714	ItemDate-Person-FeeAccount	1	ItemDateId	
714	ItemDate-Person-FeeAccount	2	PersonId	
714	ItemDate-Person-FeeAccount	3	FeeAccountId	Account for billing hourly fees for this Person and ItemDate.
714	ItemDate-Person-FeeAccount	3	IpfsStatus	For example: Pending, Approved, Invoiced, or Posted
714	ItemDate-Person-FeeAccount	4	BillableTime	For example, a total number of tenth hours cumulated between user activations of time collection functions (buttons 466, 474, 432, 434; and box 436).
714	ItemDate-Disbursement-ExpenseAccount	4	IdeStatus	For example: Pending, Approved, Invoiced, or Posted
714	ItemDate-Person-FeeAccount	5	BillingrateOverride	A rate to charge that is used in place of the BillingRate (506) of this Person
716	Item-ItemDate	1	ItemId	
716	Item-ItemDate	2	ItemDateId	
718	ItemDate-Disbursement-ExpenseAccount	1	ItemDateId	
718	ItemDate-Disbursement-ExpenseAccount	2	DisbursementId	
718	ItemDate-Disbursement-ExpenseAccount	3	ExpenseAccountId	Account for billing expenses, for example, a credit card number.
718	ItemDate-Disbursement-ExpenseAccount	4	DisbursementQty	For example, the number of pages of a received FAX as discussed above.
718	ItemDate-Disbursement-ExpenseAccount	5	DisburseDiscount	
720	Item-Location	1	ItemId	
720	Item-Location	2	LocationId	

Ref.	Database Table Name	#	Field Name	Comment
722	Item-Resource	1	ItemId	
722	Item-Resource	2	ResourceId	
724	Item-Document	1	ItemId	
724	Item-Document	2	DocumentId	
726	Folder-Document	1	FolderId	
726	Folder-Document	2	DocumentId	
802	Charge	1	ChargeId	A Charge corresponds to a record selected from either ItemDate-Person-FeeAccount 714 or ItemDate-Disbursement-ExpenseAccount 718.
812	Extract-Charge	1	ExtractId	
812	Extract-Charge	2	ChargeId	
814	Charge-ItemDate-Person	1	ChargeId	
814	Charge-ItemDate-Person	2	ItemDateId	
814	Charge-ItemDate-Person	3	PersonId	Identifies who's chargeable time is associated to this ItemDate.
816	Charge-ItemDate-Disbursement	1	ChargeId	
816	Charge-ItemDate-Disbursement	2	ItemDateId	
816	Charge-ItemDate-Disbursement	3	DisbursementId	Identifies the recurrent disbursement for this ItemDate.
818	Extract-DateRange	1	ExtractId	
818	Extract-DateRange	2	DateRangeId	A period of time during which Charges are to be included in this Extract.
901	PersistentValue	1	PersistentValueId	
901	PersistentValue	2	ParameterName	Parameter names may be any field name or additional names. System defined parameters may be used to maintain context as a user proceeds on a thread (e.g., a drill down) successively applying query criteria by asserting aggregations and/or by activating icons or links that

Ref.	Database Table Name	#	Field Name	Comment
				have implied criteria associated by spatial relations or other context of the icon. System may use persistent values to log for each type of thing, the existence of at least one unread or unacknowledged thing and the absence of all unread things (e.g., tasks, appointments, contacts, folders, emails, notes attached to tasks, notes attached to appointments, notes attached to contacts, and RSVPs).
901	PersistentValue	3	ParameterValue	
902	Session	1	SessionId	For a client-server session begun by a user who may or may not yet be a Person.
902	Session	2	StartDateTime	A session is Active if the StartDateTime is in the past and the EndDateTime is null or in the future.
902	Session	3	EndDateTime	
902	Session	4	Machine	Platform information for platform-dependent communication 134 or platform-dependent presentation 212.
904	ChatMessage	1	ChatMessageId	
904	ChatMessage	2	CSentDateTime	
904	ChatMessage	3	CRcvdDateTime	
904	ChatMessage	4	Title	
904	ChatMessage	5	ChatMessageText	
906	Email	1	EmailId	
906	Email	2	ESentDateTime	
906	Email	3	ERcvdDateTime	
906	Email	4	Title	
906	Email	5	EmailText	
911	Session-Value	1	SessionId	
911	Session-Value	2	PersistentValueId	May be used for context and state that applies until the session is terminated normally.
912	Session-Person	1	SessionId	

Ref.	Database Table Name	#	Field Name	Comment
912	Session-Person	2	PersonId	
914	ChatSession-Person	1	ChatSessionId	
914	ChatSession-Person	2	PersonId	
914	ChatSession-Person	3	CpRelationship	For example: Initiator, Participant, Mediator
915	PersistentValue-Person	1	PersistentValueId	
915	PersistentValue-Person	2	PersonId	Personal preferences and configuration settings.
916	ChatSession-ChatMessage	1	ChatSessionId	
916	ChatSession-ChatMessage	2	ChatMessageId	
918	ChatMessage-Person	1	ChatMessageId	
918	ChatMessage-Person	2	PersonId	Sender
920	ChatMessage-Subject	1	ChatMessageId	
920	ChatMessage-Subject	2	SubjectId	
920	ChatMessage-Subject	3	Link	PersonId, LocationId, ResourceId, ItemId, ProjectId, DocumentId, ChatMessageId, or EmailId
922	Email-Subject	1	EmailId	
922	Email-Subject	2	SubjectId	
922	Email-Subject	3	Link	PersonId, LocationId, ResourceId, ItemId, ProjectId, DocumentId, ChatMessageId, or EmailId
924	Email-Document	1	EmailId	
924	Email-Document	2	DocumentId	A Document that is attached to an Email.
926	Email-Person	1	EmailId	
926	Email-Person	2	PersonId	

Ref.	Database Table Name	#	Field Name	Comment
926	Email-Person	3	EpRelationship	For example: To, From, Cc, Bcc.
926	Email-Person	4	EmailStatus	For example: Unread/Read for whether this person has read this email. AwaitingReply/DisposedOf for whether this person considers that the email should be replied to or has already been suitably disposed of by any means. Alternate implementations further include analogous relationships for tracking whether a Person has read a Document provided to that Person by Note or Email, and whether a Person has read a Note attached to an Item, ItemDate, Location, Resource, Project, or Person record related to that Person.
928	Document-Person	1	DocumentId	
928	Document-Person	2	PersonId	
928	Document-Person	3	DpRelationship	For example: Author, Editor, Translator, Publisher, or Distributor
930	Flag-Email-Person	1	FlagId	
930	Flag-Email-Person	2	EmailId	
930	Flag-Email-Person	3	PersonId	
932	Folder-Email	1	FolderId	A folder may serve as an in-box, out-box, or store for buffered or saved email.
932	Folder-Email	2	EmailId	
1002	Note	1	NoteId	
1002	Note	2	NoteCreationDateT ime	
1002	Note	3	Title	
1002	Note	4	NoteText	
1022	Person-Note	1	PersonId	
1022	Person-Note	2	NoteId	
1026	Location-Note	1	LocationId	
1026	Location-Note	2	NoteId	
1028	Resource-Note	1	ResourceId	

Ref.	Database Table Name	#	Field Name	Comment
1028	Resource-Note	2	NoteId	
1030	Item-Note	1	ItemId	
1030	Item-Note	2	NoteId	
1031	ItemDate-Note	1	ItemDateId	
1031	ItemDate-Note	2	NoteId	
1032	Project-Note	1	ProjectId	
1032	Project-Note	2	NoteId	
1034	Document-Note	1	DocumentId	
1034	Document-Note	2	NoteId	
1036	ChatMessage-Note	1	ChatMessageId	
1036	ChatMessage-Note	2	NoteId	
1038	Email-Note	1	EmailId	
1038	Email-Note	2	NoteId	
1042	Note-Subject	1	NoteId	
1042	Note-Subject	2	SubjectId	
1042	Note-Subject	3	Link	PersonId, LocationId, ResourceId, ItemId, ProjectId, DocumentId, ChatMessageId, or EmailId
1044	Note-Person	1	NoteId	
1044	Note-Person	2	PersonId	Author
1046	Note-Document	1	NoteId	
1046	Note-Document	2	DocumentId	A Document that is attached to a Note.
1048	Alarm-Note	1	AlarmId	
1048	Alarm-Note	2	NoteId	Any number of notes may be associated to an alarm to explain reasons for the alarm or required actions to respond to the alarm. Notes may be standard or custom and may be prepared or revised by the system and/or by the user.
1102	Aggregation-Person	1	AggregationId	
1102	Aggregation-Person	2	PersonId	

Ref.	Database Table Name	#	Field Name	Comment
1103	Organization-Aggregation	1	OrganizationId	
1103	Organization-Aggregation	2	AggregationId	
1104	Aggregation-Phone	1	AggregationId	
1104	Aggregation-Phone	2	PhoneId	
1106	Aggregation-Location	1	AggregationId	
1106	Aggregation-Location	2	LocationId	
1108	Aggregation-Address	1	AggregationId	
1108	Aggregation-Address	2	AddressId	
1110	Aggregation-DateRange	1	AggregationId	
1110	Aggregation-DateRange	2	DateRangeId	
1110	Aggregation-DateRange	3	Purpose	For example, Day view 450, Week view 452, Month view 454, or Year view (not shown).
1112	Aggregation-Resource	1	AggregationId	
1112	Aggregation-Resource	2	ResourceId	
1114	Aggregation-Category	1	AggregationId	
1114	Aggregation-Category	2	CategoryId	
1116	Aggregation-Item	1	AggregationId	
1116	Aggregation-Item	2	ItemId	
1118	Aggregation-ItemDate	1	AggregationId	

Ref.	Database Table Name	#	Field Name	Comment
1118	Aggregation-ItemDate	2	ItemDateId	
1120	Aggregation-Project	1	AggregationId	
1120	Aggregation-Project	2	ProjectId	
1122	Aggregation-FeeAccount	1	AggregationId	
1122	Aggregation-FeeAccount	2	FeeAccountId	
1124	Aggregation-ExpenseAccount	1	AggregationId	
1124	Aggregation-	2	ExpenseAccountId	
1126	Aggregation-Disbursement	1	AggregationId	
1126	Aggregation-Disbursement	2	DisbursementId	
1128	Aggregation-ChatSession	1	AggregationId	
1128	Aggregation-ChatSession	2	ChatSessionId	
1130	Aggregation-Subject	1	AggregationId	
1130	Aggregation-Subject	2	SubjectId	
1132	Aggregation-Document	1	AggregationId	
1132	Aggregation-Document	2	DocumentId	
1134	Aggregation-Email	1	AggregationId	
1134	Aggregation-Email	2	[[Id]] EmailId	
1136	Aggregation-ChatMessage	1	AggregationId	
1136	Aggregation-ChatMessage	2	ChatMessageId	

Ref.	Database Table Name	#	Field Name	Comment
1138	Aggregation-Note	1	AggregationId	
1138	Aggregation-Note	2	NoteId	
1140	Aggregation-Affiliation	1	AggregationId	
1140	Aggregation-Affiliation	2	AffiliationId	An Aggregation may include one or more Affiliations.

[0105] Presentations of information describing an entity (e.g., an Item, an ItemDate, a Person, a Location, a Resource, a Project, a Document, a ChatMessage, or an Email) may indicate unread attached notes, documents, or email is available to be read. Unread notes, documents, or email may be related to the presented information by having a common subject. A method, performed by affiliation manager 136, for preparing a presentation, according to various aspects of the present invention, may include recalling an entity record (e.g., a Person, Location, Resource, Project, Document, ChatMessage, or Email); determining if a relationship links the entity record to a subject entity; and determining if the subject entity is further linked to an unread entity record (e.g., a Document, Note, Email, or ChatMessage). Affiliation manager 136[[,]] forms relationships from a Note, Document, ChatMessage, or Email to a particular subject and [[by]] maintains relationships from that particular subject to other entities to which unread Documents, Notes, ChatMessages, and Email may be related via the common particular subject.

[0114] In operation, customers 1240 may browse personal affiliations 1224 and other websites 1226 as well as other web sites of Internet 1204 (servers not shown) in any conventional manner. In this example, suppose that web site 1234 is hosted for public access and additional files 1232 are hosted for employee access only. Employees 2108 may browse the company web site 1234, view and edit additional files 1232, and collaborate via communication and information exchange as discussed above as served by AM Co. server 1202. For example, appointments, projects, tasks, notes, and emails of Affiliations 1222 are accessible only to employees 1208 as affiliates of ABC Co. affiliations 1222. As desired, an employee 1208 acting as administrator of ABC affiliations 122 may grant limited access to a “guest account” and/or to specific individuals as discussed above with reference to access aggregations to facilitate collaboration among

employees 1208 and customers 1240. In one implementation, a customer 1240 browsing web site 1234 follows link 1236 (or activates a suitable icon 1236). With or without express notice to customer 1240, the link (or icon) may present a login request to affiliation manager 200 for access to an affiliation 1222. The login request may utilize the “guest account”. In an other implementation, the customer is presented with a login presentation for entry of a suitable username and password. Either ABC Co. (or AM Co. as agent for ABC Co.) may have provided in any conventional manner (e.g., by land mail, voice phone, FAX or email) a username and password for use by customer 1240. After login is accepted by affiliation manager 200, customer 1240 may be presented with file server, web site server, or affiliation manager functions as discussed above. Useful but limited access may be provided by process 200 without item by item grants. For example, if the access aggregation and usage rights are specified to include all data and items existing and to be developed that are associated with a particular customer’s name, then as a consequence of associating the particular customer’s name to any item or data, the customer will have access to it. For instance, as a consequence of an employee meeting planner who associates the particular customer to an appointment, customer 1240 sees the appointment along with any other personal data 1224 on an integrated “all affiliations” view. As desired, employee 1208 may upload additional files 1232 as public data 1226. [[ON]] On the other hand, employee 1208 may upload the same files 1232 as documents (or notes, folders, or email) of an affiliation 1222 within the access aggregation assigned to customer 1240. Consequently, each document uploaded may be subject to access limitations as discussed above; and further may be automatically identified as “unread” to customer 1240 for his or her immediate attention.

[0118] Set of icons 1320 illustrates all possible icons. In a typical presentation according to schematic 1300, each icon may appear once, if at all. Set 1302 includes, as shown from left to right, task (clip board) icon 1311, calendar icon 1312, person (face) icon 1313, folder icon 1314, email (envelope) icon 1315, note icons 1316, 1317, and 1318, and RSVP (question mark) icon 1319. Each icon is presented when unread (or unacknowledged) information of the type implied by the icon is present in any affiliation the user has access to. By activating the icon, a request is made to the server to prepare and present a list of the corresponding unread (or unacknowledged) information. According to various aspects of the present invention, such [[as]] a list includes

rows as described below with reference to 1364-1367. Icon 1316 indicates at least one unread note of the type attached to a task. Icon 1317 indicates at least one unread note of the type attached to an appointment (calendar item). Icon 1318 indicates at least one unread note of the type attached to a contact. In a preferred implementation, the color of each icon in set 1320 is uniform (all are green) and matches the color of icons of the set discussed below with reference to 1391-1396. Icons in set 1320 are responsive to posting of new and revised records in database 206 by any user at any time. Consequently, users have prompt notice of information for collaboration.

[0123] View region 1362 (when not used for a data entry form as discussed above), includes Move button 1375, Copy button 1376 and list 1364. List 1364 includes any number of rows represented schematically by rows 1365-1367. Generally, rows 1365-1367 have a common format, though several formats are available (e.g., task list, contact list, appointment list, calendar grid, to name a few). Each row corresponds generally to descriptions discussed above (e.g., 462, ~~563~~ 463, 472). The functions discussed with reference to presentations 400 and 1300 may be combined in any suitable manner for ease of use by the user. At least one format is available for presenting a plurality of any type of item or data as discussed above, information, links, and icons for one such item or data per row. According to various aspects of the present invention, each row includes a set of icons similar in appearance to icons in other rows of list 1364, similar in appearance to icons of region 1302 and similar in appearance to icons of region 1332.

[0124] Row 1365 includes flag icons 1368, links 1377, a set of icons 1380 (1383-1396), and a set of subscript icons 1382, and information 1398 describing the item or data of the row (e.g., a task, a contact, an appointment, a folder, a message, or a note).

[0129] Icons for time and expense posting include expense icon (~~eollar~~ dollar sign) 1389 (with a query for all expenses charged to the appointment of this row), and timer (clock) icon 1390 activation of which starts and stops billing to the appointment of this row. Queries of icons 1383-1389 provide quick access to all information related to the appointment of this row and provide a stepwise drill down for further related information (increasingly qualified) as each icon of a similar set of icons in a row of a subsequently presented list is activated.